

Retirement Services Update

Second Quarter 2017

Joint Meeting

Employee Trust Funds Board, Teachers Retirement Board

Wisconsin Retirement Board

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Division of Retirement Services



Second Quarter

Calls



Volume



Answer speed as
quarter progressed

Education



Volume



6,200+ members
served through retirement
sessions and presentations

Retirement



Applications

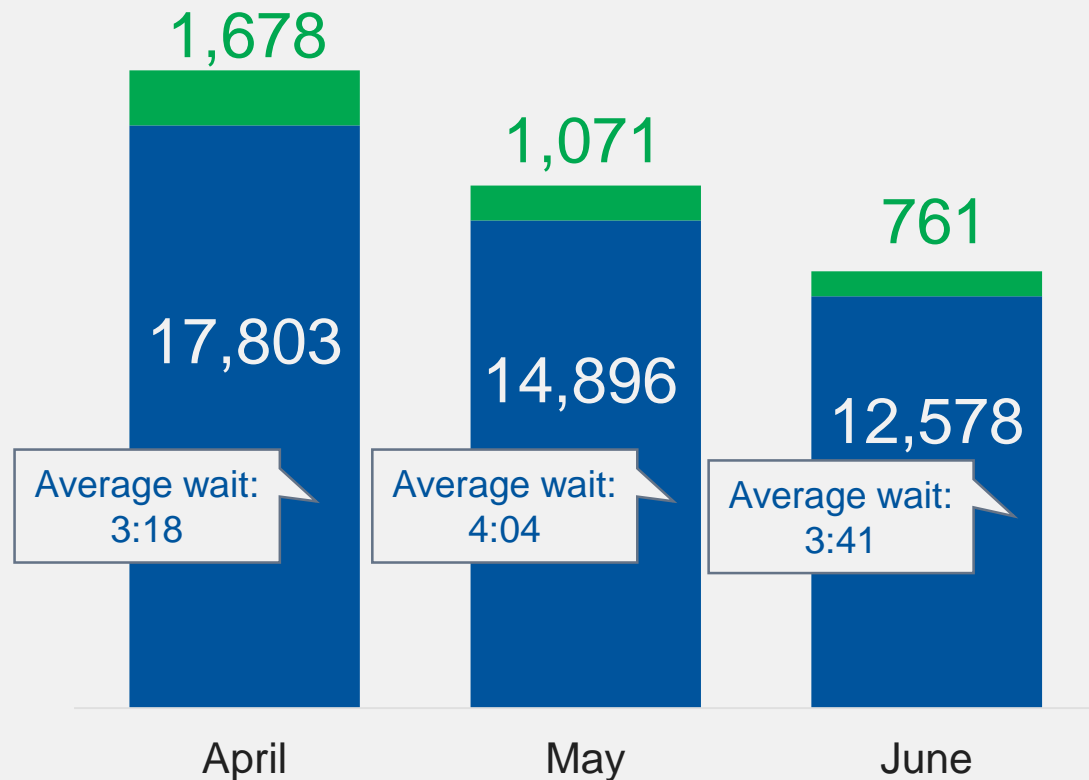


Estimates



Customer Service

Call Volume Over 2016



Wait times typically longer in May,
after annual statements mailed

Prior Years - Quarter 2 Totals					
	2017	2016	2015	2014	2013
Email	4,124	3,135	3,347	3,273	2,905
Calls	48,277	44,272	44,909	46,010	44,689

Shifting Service Delivery

Individual Retirement Sessions: 2,480

Members Served	2,480 (+802)
Breakdown by Interaction Type:	
- With an in-person appointment	992 (+38)
- With a virtual appointment	81 (+80)
- Without an appointment	130 (-398)
- Via Quick Service	1,277 (+1,082)

Small Group Retirement Sessions: 73

Members Served	548 (-235)
<i>Average number per session</i>	8

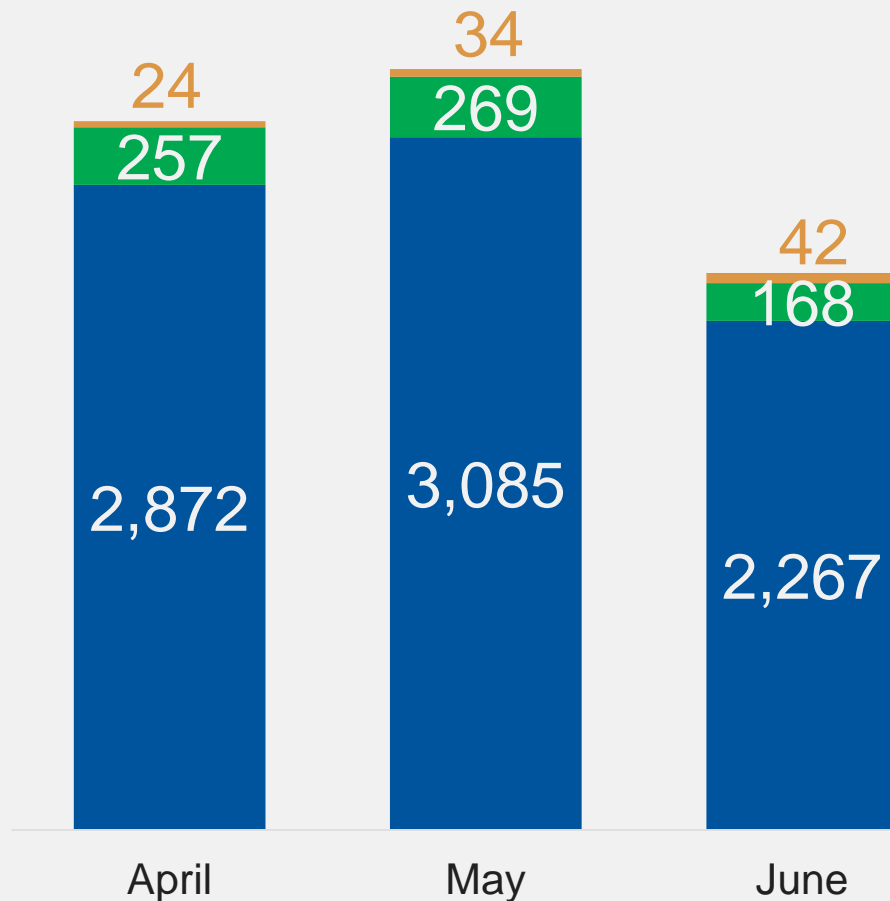
Webinar Presentations: 57





Members Served	1,818 (-363)
<i>Average number per session</i>	31

Field Presentations: 9

Members Served	1,423 (-419)
<i>Average number per session</i>	119

Beneficiary Designations ↓

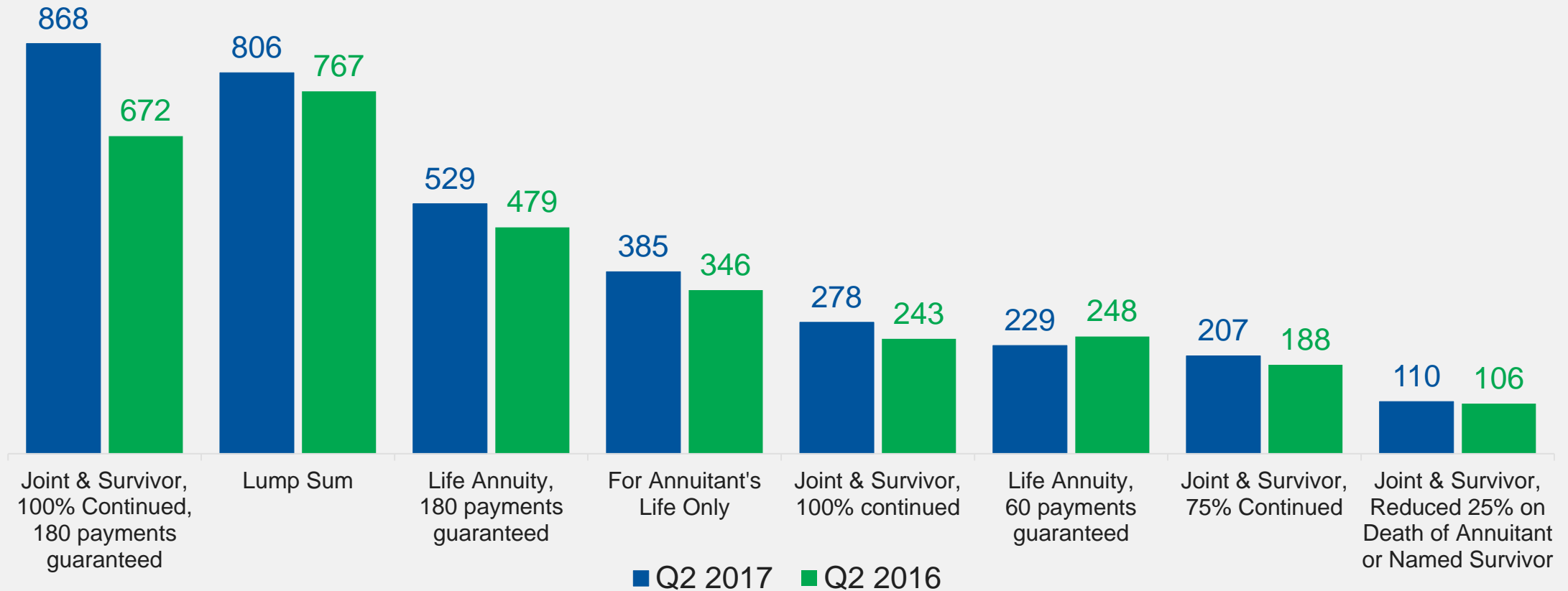


Second Quarter	2017	2016	2015
 Military Service Affidavits	2	3	11
 Domestic Partner Affidavits	100	117	139
 Rehired Annuitant Elections	694	657	626
 Beneficiary Designations	8,224	8,566	8,273
Total	9,020	9,343	9,049



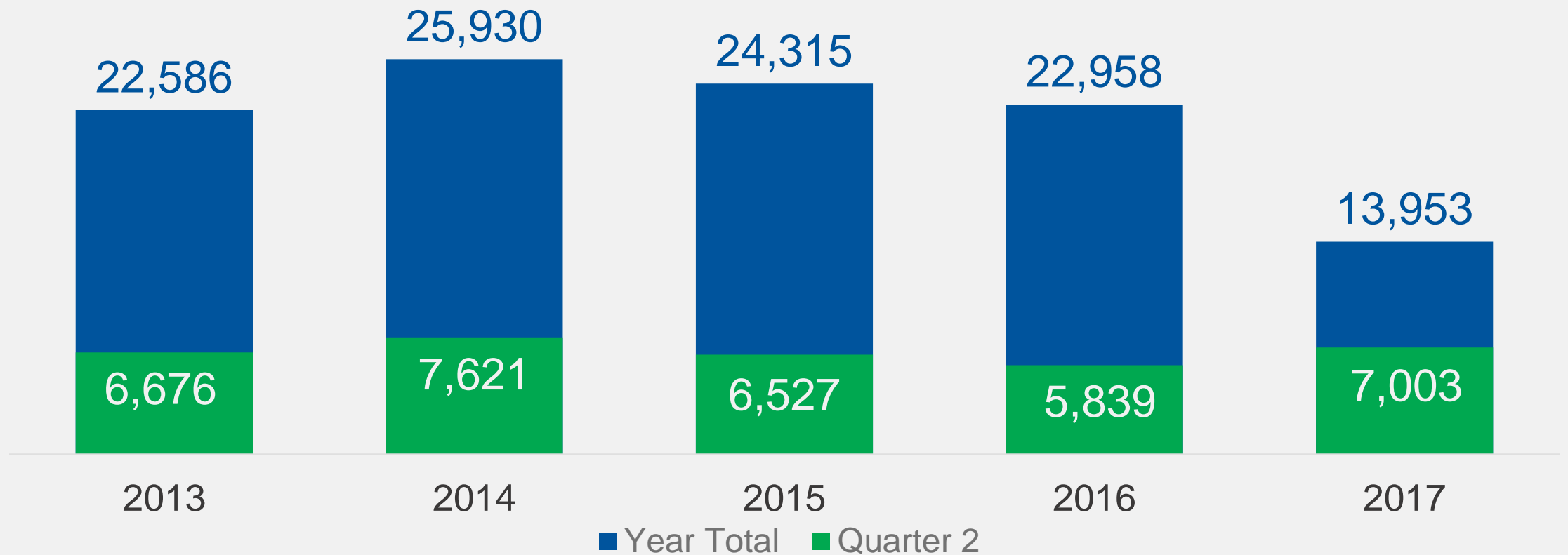
Trends

Annuity Options Are Consistent



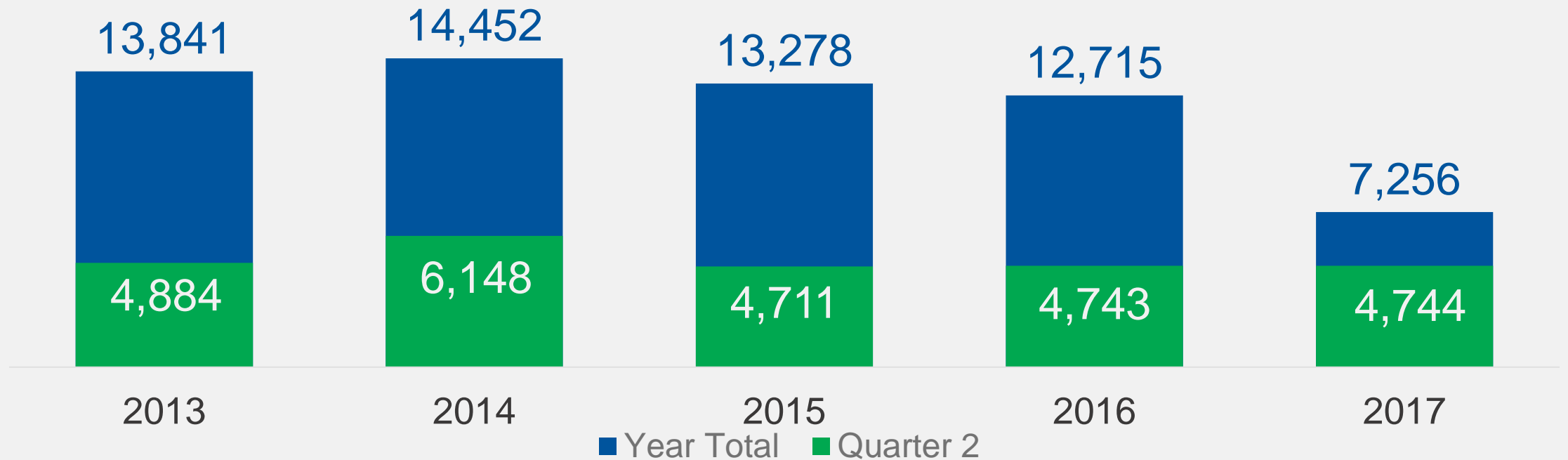
Retirement Estimate Requests

Trending ↑



Retirement Applications

On Pace With Previous Years



A photograph of a family of four outdoors. A man with grey hair and a mustache is on the left, smiling and hugging a young girl. A woman with short grey hair is on the right, smiling and hugging a young boy. The background is a blurred green landscape. The entire image has a blue overlay. The word "Questions?" is written in large white font across the bottom.

Questions?

Thank you



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ETF E-mail Updates



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